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# Cushing Terrell Improves Marketing and Business Development Through Streamlined Client and Opportunity Tracking

HSO migrates firm's CRM to aec360 running in the Microsoft cloud to centralize access to information.

## QUICK OVERVIEW

### Key Features of aec360:

- Streamlines processes for tracking prospect and customer activities.
- Provides CRM functions tailored to architecture and engineering firms.
- Helps determine if projects are a go/no-go by measuring the likelihood of closing.
- Consolidates all marketing and business development activities into one system.
- Integrates with ERP, email, and digital asset management systems.
- Runs in the cloud with a mobile interface.

### Key Benefits:

- Allows for customized functions required by marketing and business development teams.
- Provides access to customer and proposal status information through quick-view dashboards.
- Enables focusing of resources on projects likely to close.
- Streamlines responses to customers' requests for information.
- Identifies when leads turn into opportunities and then into projects.
- Enables anywhere access for people working from home and on the road.

## The Challenge: Managing Pursuits and Client Relationships to Drive Growth

Cushing Terrell continues to steadily expand their operations, and today has over 450 professionals working out of 13 offices in 7 states. With this business growth, the senior leadership team wanted to improve the company's customer relationship management capabilities. "We needed to streamline processes for tracking prospect pursuits as well as our existing customer relationships," says Toni Schneider, Regional Director of Marketing. "Enhancing our workflows in both areas was necessary to drive our future growth."

Previously, Cushing Terrell relied on Deltek Vision as their CRM platform. To meet the firm's growth objectives, Schneider felt the company needed a CRM solution with more robust marketing and business development capabilities. For example, Schneider points to the ability to determine if a pursuit is a "Go" or "No Go" so that Cushing Terrell can assign the necessary resources to manage the deal. "We have a specific set of questions for our internal teams to answer," Schneider explains. "That required a CRM system with the flexibility to build in our unique qualification process."

Cushing Terrell also sought to migrate to a CRM platform that could consolidate all marketing and business development activities, along with customer and project data, into one system. This would make information readily available to all team members and management to understand the current status of prospect pursuits and proposals.

"For many of our proposals, we want to leverage information from past proposals," adds Schneider. "With everything in one place, we can tap into that information more quickly and deliver proposals to customers sooner—which increases our chances of closing on the business."

"Once we saw just how much aec360 can do, our marketing and business development teams kept coming up with custom functions they would like to see, and HSO helps us apply the necessary changes quickly."

**Victoria Matthews, Cushing Terrell CRM Manager**

## The Solution: aec360 Checks All the Boxes in a Competitive Analysis

To solve the challenge of selecting the right CRM solution, Schneider and CRM Manager Victoria Matthews first assembled a team from the marketing and business development departments. The team then met with several potential solution providers, using a competitive analysis worksheet to make sure they selected the solution that would best achieve the project's objectives.

In addition to tracking and automating contact, lead, opportunity, proposal, and customer relationship activities, their analysis called for a CRM solution that could integrate with their existing ERP system, with Microsoft Outlook, and with their OpenAsset digital asset management system. "The ability to customize the solution was also critical so we could add any functionality our marketing and business development teams require," says Matthews. "Access to information was another key—that meant we needed a solution that provides dashboards with quick views into reports and runs in the cloud with a mobile interface so our teams can tap into the CRM system from anywhere they work."

After reviewing all the potential solution candidates, HSO's aec360, built on Microsoft Dynamics 365, was the only one that checked all the boxes. Other key attributes also included the ability to scan business cards, potential to conduct email marketing campaigns, consolidate and track all communications with prospects and customers, and the ability to quickly search for information.

"The entire selection team supported the choice of aec360," says Schneider. "The integration with OpenAsset is a big plus so we can bring photography and other digital assets into aec360 at the end of a project to help us sell our services for the next project."

Schneider and Matthews both also value the HSO approach. "Once we saw just how much aec360 can do, our marketing and business development teams kept coming up with new functions they would like to see," says Matthews. "HSO has helped us apply the necessary changes quickly."

Matthews also emphasizes how easy it is to learn the back-end components of aec360, and for internal teams to learn how to use the front-end application. "The software is intuitive enough that we can teach ourselves and learn how to customize our workflows," Matthews says. "But if we get stuck on anything, HSO is always there to provide support through immediate screen-sharing sessions. They're also good at finding alternative ways for the solution to provide any complex functions we need."

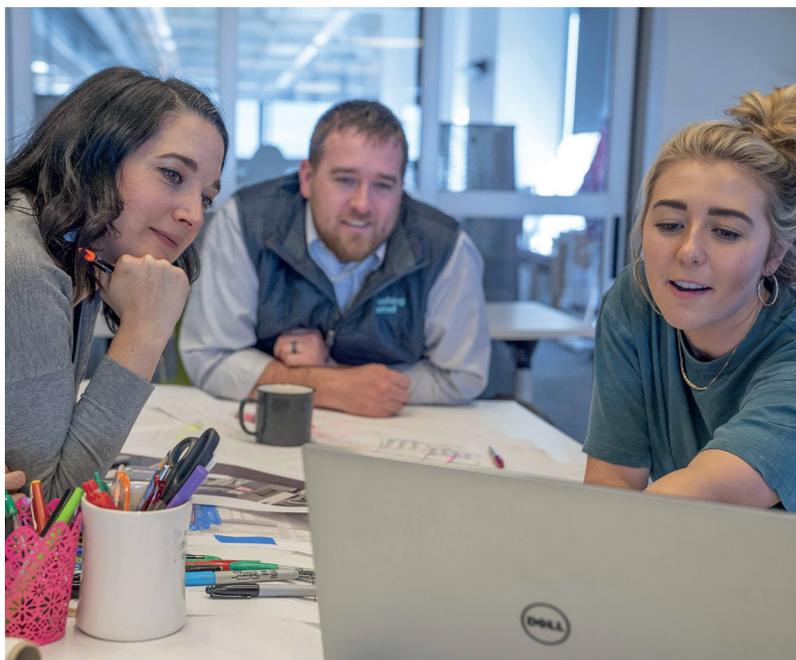
## The Results: All of the Important Information, Easily Accessible in One Place

As with the rollout of any new enterprise software solution, end-users were hesitant at first to change to a new way of handling CRM. But that hesitancy went away once they saw how easily they could navigate the aec360 screens.

Having all marketing and business development information in a central CRM system makes it easy for the Cushing Terrell team to search for information—rather than having to check multiple spreadsheets. They also know the information won't move—it's always in the same place.

Cushing Terrell uses aec360 to analyze prospect pursuit data, proposals, requests for qualification, project information, and project closeouts. The business development team tracks lead communications, who last talked to a prospect, and whether leads are worth pursuing. They can also track when leads are promoted to opportunities and when opportunities are promoted to projects. aec360 keeps all the records in one place.

"The timeline feature is another aspect we're excited about," Schneider points out. "We can look back to the first instances of emails and where leads came from. We can often apply what we learn to another pursuit or lead—seeing similarities of marketing and business development tactics that worked, as well as what didn't work."



The go/no-go workflows in aec360 have also been a big hit. “HSO built fields that calculate the likelihood of a project closing, which is based on the answers our business development team members give to a series of questions,” Matthews explains. “Each question has its own calculated weight, and if the total number equals a high percentage, we know absolutely that we’ll pursue it. If it’s a middle grade, we perhaps bring in a third party. And for the lower grades, we choose not to pursue. We then document the reason in the system, which is helpful for future qualification efforts.”

Adds Schneider, “Previously, information such as customer emails, go/no-go decisions, and RFP responses were all in separate locations. Time spent searching for needed information was time wasted. With aec360, we can quickly access everything from tabs, which helps us respond to customers more quickly.”

## Why HSO

Looking ahead, functions that Schneider and Matthews plan to add include contact harvesting and email signature scraping. These services—provided by HSO’s relationships360—analyze prospect information and score relationships based on key interactions including emails, tasks, appointments, phone calls, and notes. This will enable Cushing Terrell to know who in the company has the strongest connection with each prospect. Cushing Terrell will also track where prospects come from and how many have visited their website.

“From the beginning, HSO has been helpful and responsive,” Schneider says. “They gave us quality training on aec360 so we could pick up the backend to the point where people without a technical degree can create new features.”

“Not only does HSO give us the training to do a lot on our own, they also provide resources we can use in a pinch,” adds Matthews. “They gave us tips on how to search for help, which is a big reason why we picked up so quickly on aec360. And we never run into a scenario where HSO can’t fix something. If there’s an issue, they find an alternative—we’ve never been left empty-handed.”

## About Cushing Terrell

Cushing Terrell is on a mission to invent a better way of living. Founded in 1938 by two architects, the company empowers creative designers to discover imaginative, responsible, first-of-their-kind environments. By integrating architecture, engineering, and design, the Cushing Terrell design process opens doors for transformative thought and enhanced creativity. The company’s broad range of specialized offerings also includes architecture, engineering, planning, and interior design, among other building design services.



” With all business development and marketing activity in one place—aec360—we can tap into that information more quickly and deliver proposals to customers sooner, which increases our chances of closing on the business.“

*Toni Schneider,*  
*Cushing Terrell*  
*Regional Director of Marketing*

